

Message Text

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ACTION EB-07

INFO OCT-01 EUR-12 IO-13 ISO-00 AGR-10 CEA-01 CIAE-00

COME-00 DODE-00 FRB-01 H-02 INR-07 INT-05 L-03 LAB-04

NSAE-00 NSC-05 PA-02 AID-05 CIEP-02 SS-15 STR-04

ITC-01 TRSE-00 USIA-15 PRS-01 SP-02 FEAE-00 OMB-01

/119 W

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R 121349Z AUG 76

FM AMEMBASSY LONDON

TO SECSTATE WASHDC 4488

INFO AMEMBASSY BRUSSELS

AMEMBASSY BONN

AMEMBASSY COPENHAGEN

AMEMBASSY DUBLIN

AMEMBASSY THE HAGUE

AMEMBASSY LUXEMBOURG

AMEMBASSY PARIS

AMEMBASSY ROME

USMISSION EC BRUSSELS

USMISSION OECD PARIS

USDEL MTN GENEVA

UNCLAS SECTION 01 OF 02 LONDON 12626

E.O. 11652: N/A

TAGS: EAGR UK

SUBJECT: DROUGHT IMPACT ON UK AGRICULTURE

BEGIN SUMMARY. EARLIER OPTIMISM THAT DROUGHT IMPACT ON
BRITISH AGRICULTURE MIGHT NOT BE TOO SEVERE IS NOW
EBBING AWAY. MOST REPORTS OF CEREALS HARVEST SPEAK OF
THIN, SHRIVELLED GRAINS. MOST IMPORTANT FACTOR TO NOTE,
HOWEVER, IS THAT NOTHING IS CURRENTLY DEVELOPING OR
GROWING. SPECIAL CONCERN IS FELT ABOUT POTATOES, SUGAR
BEET AND WINTER FODDER. MEANWHILE, AFTER COOLER SPELL
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LATE JULY - FIRST FEW DAYS OF AUGUST, WEATHER IS NOW

WARMING UP AGAIN WITH SOUTHERN ENGLAND TEMPERATURES
MOVING BACK INTO UPPER 70'S. END SUMMARY.

1. NO RELIEF FROM DROUGHT CONDITIONS HAS OCCURRED IN UK
SO FAR THIS MONTH AND DRYNESS IS EXTENDING NORTHWARDS
WHERE PREVIOUSLY CONDITIONS WERE MUCH BETTER THAN IN
SOUTHERN AND EASTERN ENGLAND. MINISTRY OF AGRICULTURE
HAS STILL NOT RELEASED ANY OFFICIAL FIGURES OF GRAIN YIEL
YIELDS PER ACRE NOR EVEN YET OF CROP AREAS IN ENGLAND AND
WALES. WE CURRENTLY ESTIMATE ON A TENTATIVE BASIS THAT
TOTAL GRAIN PRODUCTION WILL BE 14.6 MILLION TONS (13.8
MILLION TONS IN 1975). BREAKDOWN OF INDIVIDUAL CROPS
WITH COMPARISONS FOR 1975 AS FOLLOWS:

WHEAT	5.50	(4.44)
BARLEY	8.21	(8.45)
OATS	0.76	(0.80)
MIXED GRAINS		
AND RYE	0.12	(0.15)

YIELDS PER HECTARE ARE STILL EXPECTED TO BE ABOVE LAST
YEAR'S VERY POOR RETURNS BUT NOW ONLY SLIGHTLY BETTER
AND BELOW AVERAGE. WHEAT PRODUCTION IS BOOSTED MAINLY BY
EXPECTED LARGE INCREASE IN THE AREA. REPORTS OF SHRIV-
ELLED GRAIN AND SHEDDING BECOMING MORE NUMEROUS AND
WIDESPREAD AND AS DRY CONDITIONS ARE NOW EXTENDING
NORTHWARDS EARLIER EXPECTATIONS OF EXCELLENT BARLEY CROPS
AWAY FROM VERY DRY EAST AND SOUTH ARE DIMINISHING.

2. GRAIN USE IN ANIMAL FEED CURRENTLY EXPECTED TO BE
AROUND THE 12.8 MILLION TONS (12.4 MILLION) WITH ENTIRE
INCREASE ATTRIBUTED TO HEAVIER CORN IMPORTS TO MAKE UP
FOR EXPECTED DECLINE IN BARLEY AND FEED WHEAT IMPORTS
FROM EC PARTNERS WHERE SUPPLIES OF DOMESTIC GRAIN LIKELY
TO BE EVEN TIGHTER THAN IN UK.

3. MORE WORRY ATTACHES TO FEED SITUATION. GROWTH OF
PASTURE, FODDER, KALE AND ROOT CROPS HAS VIRTUALLY CEASED
AND IN SOME AREAS IT IS THOUGHT THAT EVEN HEAVY PROLONGED
RAIN NOW WILL BE TOO LATE TO RECTIFY THE SITUATION.

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TO SECSTATE WASHDC 4489

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SUGAR BEETS ARE FAILING TO BULK AND BEET PULP SUPPLIES
WILL PROBABLY AGAIN THIS YEAR BE LIMITED. FARMERS IN
MANY AREAS ARE ALREADY FEEDING HAY AND SILAGE WHICH
WOULD HAVE BEEN KEPT FOR COMING WINTER. AS YET THERE IS
NO PANIC SELLING OF CATTLE AND MARKETINGS ARE IN FACT
WELL DOWN FROM THIS TIME LAST YEAR WHEN ADMITTEDLY THE
FIGURES WERE UNUSUALLY INFLATED BY COMPLEX
COMBINATION OF FACTORS OF WHICH 1975
DROUGHT WAS ONLY ONE.

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4. LACK OF PASTURE GROWTH HAS BROUGHT ABOUT A COMPLETE

REVERSAL OF THE VERY EXPANSIVE MOOD IN THE DAIRY SECTOR OF FIRST HALF OF 1976. MILK MARKETING BOARD ANNOUNCED AUGUST 11 THAT UK BUTTER PRODUCTION WILL BE HALTED BY END AUGUST BECAUSE OF SUBSTANTIAL DROP IN MILK OUTPUT AND QUALITY. UP TO END MAY MILK AND BUTTER PRODUCTION HAD BEEN RUNNING AT OR NEAR RECORD LEVELS.

5. EXPECTATION NOW GROWING THAT POTATO CROP COULD BE NEARLY AS LOW AS LAST YEAR'S AND THAT SUGAR BEET HARVEST WILL BE WELL DOWN FOR THIRD YEAR IN SUCCESSION. VEGETABLES FOR HUMAN CONSUMPTION ALSO SUFFERED BADLY AND EXPECTATION GROWS OF VERY HIGH PRICES AND SHORT SUPPLIES FOR WINTER GREENS, CARROTS AND OTHER ROOT VEGETABLES. ONLY DECIDUOUS FRUIT CROPS SEEM TO HAVE ESCAPED WORST OF DROUGHT IMPACT WITH APPLES ABOUT THE SAME AS LAST YEAR AND NEAR THREE-FOLD INCREASE IN PEAR PRODUCTION.

6. PRESSURE IS NOW ONCE AGAIN MOUNTING FOR GREEN POUND DEVALUATION TO COMPENSATE FARMERS FOR ABOUT-TURN IN THEIR FORTUNES BECAUSE OF THE DROUGHT. GOVERNMENT IS FACED WITH DILEMMA OF KEEPING AGRICULTURAL SECTOR VIABLE WHILE FACED WITH THREAT TO ANTI-INFLATION POLICY THROUGH DIRECT EFFECTS OF THE DROUGHT AND FURTHER INFLATIONARY ASPECT OF ANY GREEN POUND ADJUSTMENT.

ARMSTRONG

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